DII EPMO – Project Deliverables Matrix

Deliverable / Artifact	Required Project Tracks														
	Light					Classic					Robust				
	Explore	Initiate	Plan	Execute	Close	Explore	Initiate	Plan	Execute	Close	Explore	Initiate	Plan	Execute	Close
EXPLORE															
2-Business Case and Cost Analysis	C					C					C				
INITIATE															
2-Scope Statement		PM													
1-Abbreviated Charter							PM								
1-Charter												PM			
Project Log – Test Cases		PM					PM					PM			
Project Log – ChangeLog							PM					PM			
Project Log – Action Items							PM					PM			
Project Log – Issues							PM					PM			
Project Log – Busget							PM					PM			
Project Log – RACI												PM			
Project Log – Risk Log												PM			
PLAN															
Project Log – Requirements			PM					PM					PM		
3-MS Project Plan			PM					PM					PM		
Project Log – Communication Plan													PM		
1-Project Management Plan													PM		
5-Implementation Plan													PM		
EXECUTE															
7-Summary Status Report				PM					PM						
7-Detailed Status Report														PM	
7-Meeting Agenda and Discussion Log									PM					PM	
5-Test Plan									PM					PM	
1-Change Request									PM					PM	
CLOSE															
1-Final/formal Acceptance *										PM					PM
1-Customer Satisfaction Survey										PM					PM
1-Lessons Learned										PM					PM

Legend:

✓ **# before Deliverable/Aritfact name**: represents one of the 9 *PMBOK Knowledge Area* folders.
Project Log has no number because it's located at the root of all 9 folders.

✓ **C:** Customer

✓ **BA:** Business Analyst

✓ **PM:** Project Manager

✓ ***** **:** Formal Acceptance is completed for deliverables anytime throughout project process.

DII EPMO - Situationally Optional Deliverables

Situationally Optional Deliverables	Situationally Optional - Project Tracks														
	Light					Classic					Robust				
	Explore	Initiate	Plan	Execute	Close	Explore	Initiate	Plan	Execute	Close	Explore	Initiate	Plan	Execute	Close
Optional EXPLORE															
0-Budget Request Form	C					C					C				
4-Cost Benefit Analysis	BA					BA					BA				
Optional INITIATE															
4-VISION Project Code Request		PM					PM					PM			
Optional PLAN															
1-Issue Management Plan								PM					PM		
1-Change Management Plan								PM					PM		
1-Business Impact Analysis													PM		
2-Abbreviated Requirements		BA					BA								
2-Detailed Requirements							BA						BA		
2-Business Requirements Report													BA		
2-Requirements Traceability Matrix			PM					PM					PM		
2-Scope Management Plan								PM					PM		
2-Detailed Design Document		EA					EA					EA			
3-Large MS-Project Plan			PM					PM					PM		
3-Large MS-Project Plan-Technical			PM					PM					PM		
3-Schedule Checklist								PM					PM		
4-Cost Estimate Summary			PM					PM					PM		
4-Detailed Effort and Cost Estimating													PM		
4-Std Cost Estimating Assumptions		BA					BA					BA			
5-Quality Management Plan													PM		
5-Quality Assurance Checklist													PM		
6-Human Resource Management Plan													PM		
6-Resource Requirements													PM		
6-Responsibility Matrix			PM					PM					PM		
6-Team Directory			PM					PM					PM		
7-Communications Management Plan								PM					PM		
7-Kickoff Meeting Log													PM		
8-Abbreviated Risk Management Plan								PM							
8-Risk Management Plan								PM					PM		
8-Risk Assessment Exercise													PM		
8-Risk Factors Checklist													PM		
8-Risk Identification Worksheet			PM					PM					PM		
8-SWOT Analysis Worksheet													PM		
9-Procurement Management Plan								PM					PM		
9-SLA			PM					PM					PM		
9-RFP			PM					PM					PM		
9-RFP MS Project Plan								PM					PM		
9-RFP Steps								PM					PM		

DII EPMO - Situationally Optional Deliverables

Deliverable													
9-QA Checklist for Outsourced								PM			PM		
9-Statement of Work (SOW)			PM					PM			PM		
9-AA-14			PM					PM			PM		
9-Sole Source Justification			PM					PM			PM		
9-Deliverable Management Process								PM			PM		
Optional EXECUTE													
1-Issue Log				PM					PM			PM	
1-Issue Submission Form				PM					PM			PM	
1-Change Control Log				PM					PM			PM	
1-Change Request Form				PM					PM			PM	
4-Budget Log				PM					PM			PM	
5-Acceptance Criteria												PM	
5-Test Case Matrix				PM					PM			PM	
6-Action Item Log				PM					PM			PM	
7-Communication Matrix				PM					PM			PM	
8-Risk Submission Form												PM	
8-Risk Tracking Log												PM	
9-Independent Review Summary									PM			PM	
9-Independent Review SOW									PM			PM	
9-Independent Review RFQ									PM			PM	
9-Vender Presentation Rating									PM			PM	
9-Vendor Proposal Rating									PM			PM	
9-Abbreviated Vendor Reference									PM				
9-Vendor Reference Check												PM	
9-Confidentiality Agreement				PM					PM			PM	
9-Non-disclosure Agreement				PM					PM			PM	
Optional CLOSE													
1-Documentation Summary										PM			PM
1-Closeout questions					PM					PM			PM
1-Closeout Report													PM
1-Completion Checklist										PM			PM
1-Phase Acceptance										PM			PM
1-Phase Gate 0 Checklist										PM			PM
1-Phase Gate 1 Checklist										PM			PM
1-Phase Gate 2 Checklist										PM			PM
1-Phase Gate 3 Checklist										PM			PM
1-Phase Gate 4 Checklist										PM			PM
1-Support Transition Plan										PM			PM
1-Customer Review										PM			PM
1-Peer Review										PM			PM
5-Project Scorecard													PM
5-End of Project Metrics													PM